



BUSINESS PLAN [YEAR]





Property Management

Adding Care to your Property.

 **John Doe**

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 <http://www.example.com>

Information provided in this business plan is unique to this business and confidential; therefore, anyone reading this plan agrees not to disclose any of the information in this business plan without prior written permission of the company.

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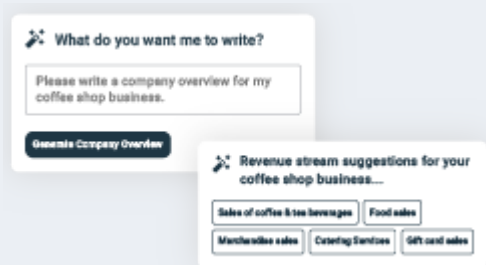
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1.

Executive Summary

Mission statement

Vision Statement

Customer Focus

Success Factors

Financial Summary



REMEMBER

Before you think about how to start a property management service, you must create a detailed property management business plan. It will not only guide you in the initial phases of your startup but will

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Maxwell Property Management

Maxwell Property Management Company is a Detroit-based property management firm specializing in commercial and residential properties. Its goal is to provide a solution to the real estate management problems that property owners struggle with. It h

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Mission statement

Maxwell Property Management

We are a company that is established with the aim of helping tenants (people and businesses) get the properties of their choice and to helps property owners (landlords and group owners of properties et al) effectively manage and maximize their properties in t

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Vision Statement

Maxwell Property Management

Our Vision is to become the preferred choice of landlords and tenants when it comes to property rentals in the whole of the United States of America.

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Customer Focus

Maxwell Property Management

Maxwell Property Management Company will primarily serve the residents who live within the city. The demographics of these customers are as follows:

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Success Factors

Maxwell Property Management

Maxwell Property Management Company is uniquely qualified to succeed for the following reasons:

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Financial Summary

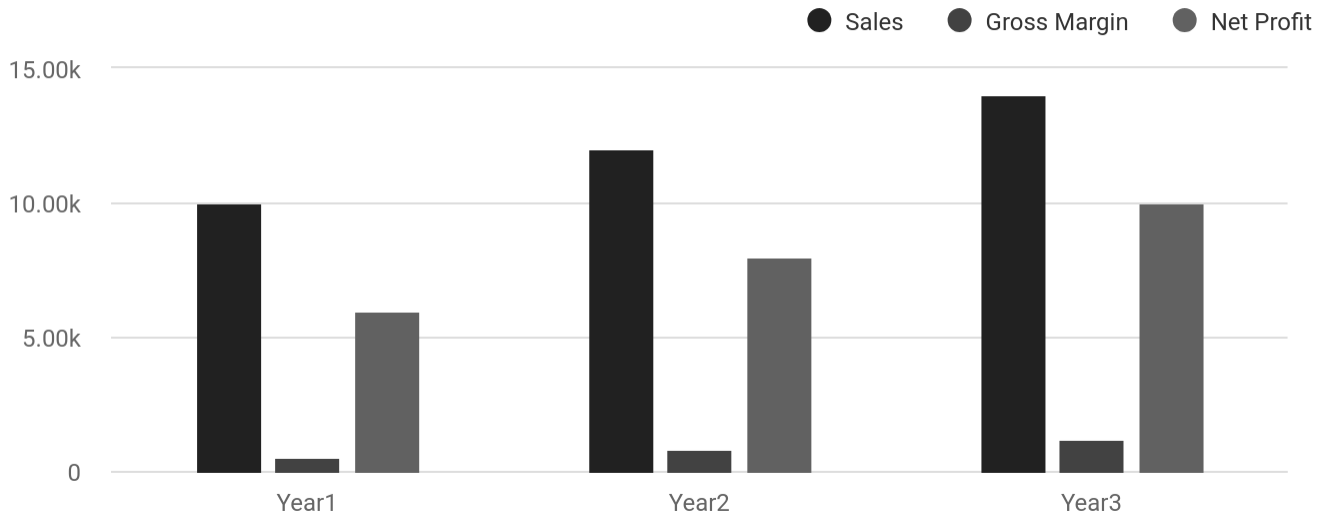
Maxwell Property Management

Maxwell Property Management Company is seeking total funding of \$210,000 of debt capital to open its firm. The capital will be used for funding capital expenditures and location build-out, hiring initial employees, marketing expenses, and working capital.

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3 Year profit forecast



Maxwell Property Management

Financial Summary

Year 1

Year 2

Year 3

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2.

Company Summary

History

Business Structure

Startup Summary

Maxwell Property Management

Maxwell Property Management Company is owned by John Moore and his immediate family members (His Wife and Son). The company is fully financed by John Moore and his son James Moore is the chief operating officer of the company.

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History

Maxwell Property Management

In 2000, John Moore, a licensed real estate broker started receiving an abundance of inquiries about marketing properties, landlord-tenant laws, and concerns about property rentals and their daily operations. Realizing that he cannot address every inquiry by him

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Business Structure

Maxwell Property Management

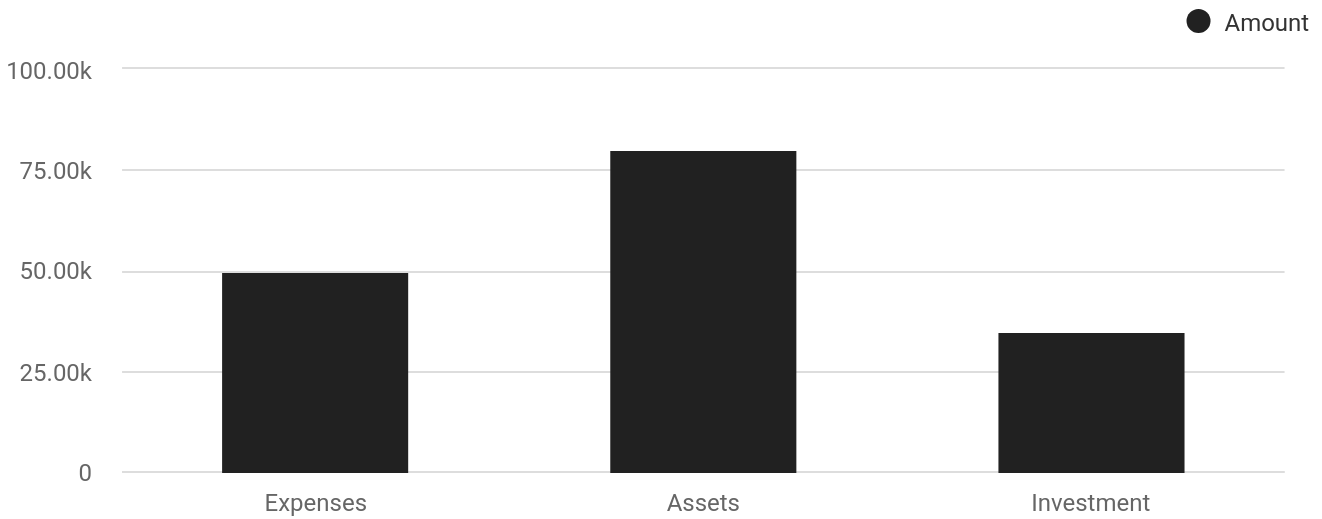
Maxwell Property Management Company is going to be structured in a way that every employee will be actively involved in the growth of the organization and employees who have worked for a period of time for the company will become part owners

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Startup Summary

Startup cost



Cost distribution

Amount

Expenses	50,000
Assets	80,000
Investment	35,000

Start-up Expenses	Amount
Legal	\$75,500
Consultants	\$0
Insurance	\$62,750
Rent	\$22,500
Research and Development	\$42,750
Expensed Equipment	\$42,750
Signs	\$1,250
TOTAL START-UP EXPENSES	\$247,500
Start-up Assets	\$0
Cash Required	\$322,500
Start-up Inventory	\$52,625
Other Current Assets	\$222,500

Start-up Expenses	Amount
Long-term Assets	\$125,000
TOTAL ASSETS	\$121,875
Total Requirements	\$245,000
START-UP FUNDING	\$0
START-UP FUNDING	\$273,125
Start-up Expenses to Fund	\$121,875
Start-up Assets to Fund	\$195,000
TOTAL FUNDING REQUIRED	\$0
Assets	\$203,125
Non-cash Assets from Start-up	\$118,750
Cash Requirements from Start-up	\$0
Additional Cash Raised	\$118,750
Cash Balance on Starting Date	\$121,875
TOTAL ASSETS	\$0
Liabilities and Capital	\$0
Liabilities	\$0
Current Borrowing	\$0
Long-term Liabilities	\$0
Accounts Payable (Outstanding Bills)	\$0
Other Current Liabilities (interest-free)	\$0
TOTAL LIABILITIES	\$0
Capital	\$0
Planned Investment	\$0
Investor 1	\$312,500
Investor 2	\$0
Other	\$0
Additional Investment Requirement	\$0
TOTAL PLANNED INVESTMENT	\$695,000

Start-up Expenses	Amount
Loss at Start-up (Start-up Expenses)	\$313,125
TOTAL CAPITAL	\$221,875
TOTAL CAPITAL AND LIABILITIES	\$221,875
Total Funding	\$265,000

3.

Products and services

Maxwell Property Management

Maxwell Property Management Company is a company that looks forward to delivering excellent services in terms of helping landlords and property owners effectively manage their properties and also providing conducive apartments and facilities to t

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Facilitating a Purchase

Guiding a buyer through the process



Facilitating a Sale

Guiding a seller through the selling process.



FSBO document preparation

Preparing necessary paperwork for "For Sale by Owner" sellers.



Property Maintenance



Exchanging property



Auctioning property for our clients.



Preparing contracts and leases.



List the property for sale to the public



Selling of Fully Furnished Properties



Selling of Landed Properties



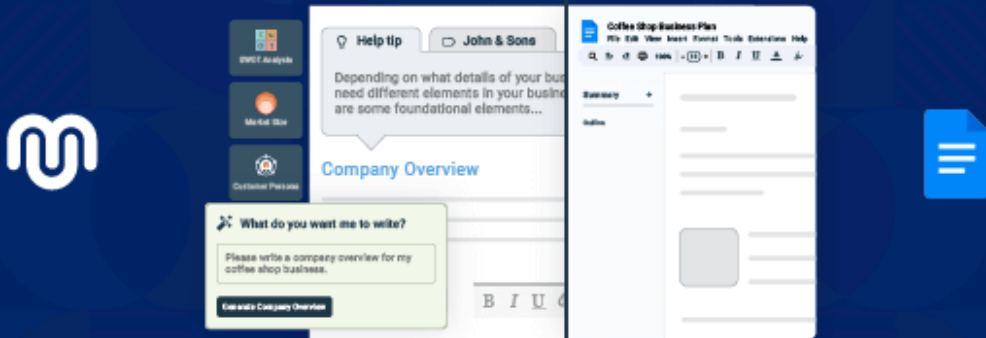
Property Management Consultancy and Advisory Services



Hold an open house to show the property.

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4.

Market Analysis

Industry Analysis

Market Trends

Target Market



REMEMBER

The most important component of an effective property management services business plan is its accurate marketing analysis. If you are starting on a smaller scale, you can do marketing analysis yourself.

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Industry Analysis

Maxwell Property Management

The Property Management industry is structurally resistant to economic downturns, primarily as a result of countercyclical demand trends. When the national economy struggles, the homeownership rate tends to decline as consumers and lenders remain cautious.

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Market Trends

Maxwell Property Management

The market trends as it involves the property management business are indeed dynamic and at the same time, pretty much easier for a newbie to come in and still make money from the industry. All that is needed for any property management company to succeed is a good marketing strategy.

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Target Market

Maxwell Property Management

Our target market as a property management company cuts across people of different classes and people from all walks of life. We are coming into the industry with a business concept that will enable us to work with the highly placed people in the country and also the middle class.

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5.

SWOT Analysis

Maxwell Property Management

No doubt, the property management business is perhaps one of the easiest and cheapest ways of entering the real estate business. As a matter of fact, all that is required to do pretty well in this line of business is a high school diploma, experience in property management, and a good network of contacts.

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Strength

Our strength as a property management company lies in the fact that we have a healthy relationship with loads of property owners (landlords) in the United States and we have some of the best hands in the industry working both as full-time employees and consultants for us. We can confidently boast that we have some of the qualities that are in high demand in the property management line of business which are trust, honesty, and relationship management.

Weakness

Our weakness could be that we are a new property management business in the United States and it may take us time and extra effort to convince landlords to give us their properties to manage for them.

Opportunity

The opportunities that are available in the real estate industry are massive and we are ready to take advantage of any opportunity that comes our way.

Threat

Some of the threats that we are likely going to face as a property management company in the United States of America are unfavorable government policies, global economic downturn, and unreasonable tenants. There is hardly anything we could do as regards these threats other than to be optimistic that things will continue to work for our good.

6.

Strategy & Implementations

Advertising Strategy

Pricing Strategy



REMEMBER

After identifying the market demand, market trends, and the potential customers of the startup, the next step is to define an effective strategy for attracting those customers. Like marketing analysis

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Advertising Strategy

Maxwell Property Management

Maxwell Property Management Company expects its target market to be individuals working and/or living within Michigan. The company's promotions strategy to reach these individuals includes:

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Maxwell Property Management

Maxwell Property Management Company will initially invest significant time and energy into contacting potential clients via telephone. In order to improve the effectiveness of this phase of the marketing strategy, a highly focused call list will be used, targeting

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Targeted Cold Calls

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Maxwell Property Management

Maxwell Property Management Company understands that the best promotion comes from satisfied customers. The Company will encourage its clients to refer other businesses by providing economic or financial incentives for every new client produced

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Referrals

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Maxwell Property Management

Maxwell Property Management Company will invest resources in two forms of geographically-focused internet promotion—organic search engine optimization and pay-per-click advertising. The Company will develop its website in such a manner as to direct a

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Online Marketing

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Maxwell Property Management

Maxwell Property Management Company will list its properties for rent and sale in key local publications, including newspapers, area magazines, and its own newsletter. Additionally, the company will print brochures and place them in specific locations fre

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Publications

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Maxwell Property Management

Maxwell Property Management Company will promote itself by distributing marketing materials and participating in local community events, such as local festivals, business networking, or sporting events.

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Community Events/Organizations

Start writing here..

Pricing Strategy

Maxwell Property Management

Part of business strategy is to ensure that we work within the budget of our clients to deliver excellent properties to them. The real estate industry is based on commissions and properties are valued by professionals based on the area the facility is located, th

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7.

Financial Plan

Important Assumptions

Break-even Analysis

Projected Profit and Loss

Projected Cash Flow

Projected Balance Sheet

Business Ratios



REMEMBER

The last component of a property management service business plan is an in-depth financial plan. The financial plan crafts a detailed map of all the expenses needed for the startup and how these expenses will be covered.

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Maxwell Property Management

The company will be financed by John himself and he will control the direction of the business to make sure that it is expanding at the forecasted rate. As for the property management service business start-up, no equity funding or outside loans will be required.

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Important Assumptions

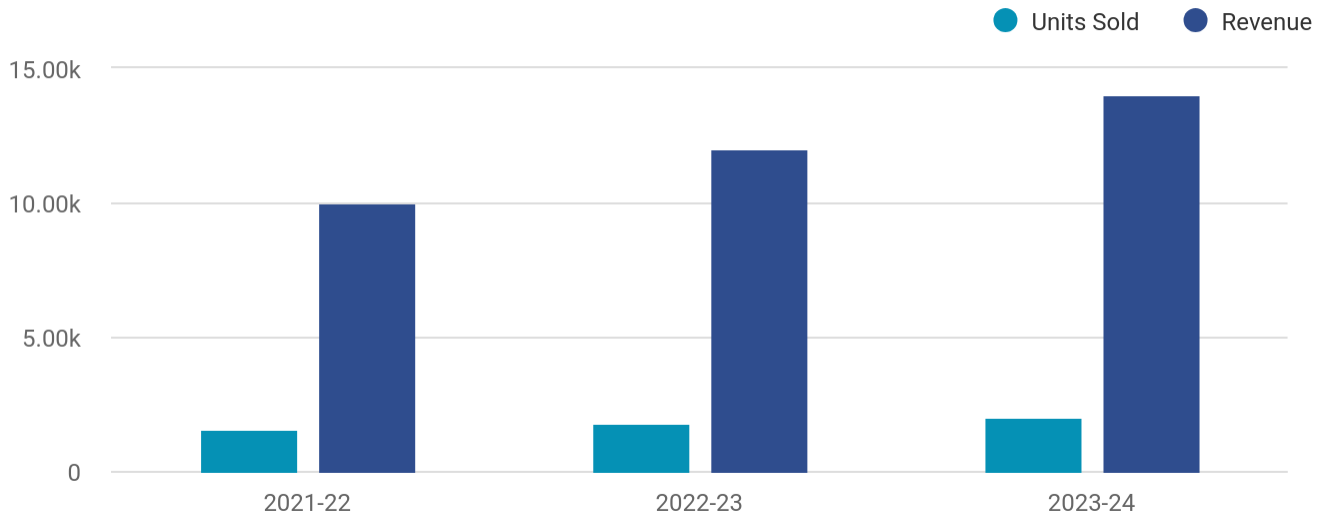
The financial projections of the company are forecast on the basis of the following assumptions. These assumptions are quite conservative and are expected to show deviation but to a limited level such that the company's major financial strategy will not be affected.

	Year 1	Year 2	Year 3
Plan Month	1	2	3
Current Interest Rate	10,00%	11,00%	12,00%
Long-term Interest Rate	10,00%	10,00%	10,00%
Tax Rate	26,42%	27,76%	28,12%
Other	0	0	0

Brake-even Analysis

Monthly Units Break-even	5530
Monthly Revenue Break-even	\$159 740
Assumptions:	
Average Per-Unit Revenue	\$260,87
Average Per-Unit Variable Cost	\$0,89
Estimated Monthly Fixed Cost	\$196 410

Units Sold v/s Revenue Chart



Financial Year	Units Sold	Revenue
2021-22	1,550	10,000
2022-23	1,800	12,000
2023-24	2,050	14,000

Projected Profit and Loss

	2024	2025	2026
Revenue	\$662,083.50	\$885,106.50	\$1,231,861.50
Monthly Management Fees	\$144,000	\$158,400	\$174,240
Unit Sales	720	792	871
Unit Price	\$200	\$200	\$200
Tenant Placement Fees	\$180,000	\$185,400	\$190,962
Maintenance Services	\$338,083.50	\$541,306.50	\$866,659.50
Unit Sales	2,254	3,609	5,778
Unit Price	\$150	\$150	\$150

	2024	2025	2026
Cost Of Sales	\$124,966.71	\$144,848.58	\$174,687.81
General Costs	\$124,966.71	\$144,848.58	\$174,687.81
Property Maintenance Costs	\$93,104.19	\$106,055.36	\$125,247.12
Property Repair Costs	\$60,000	\$61,800	\$63,654
Cleaning Services	\$33,104.19	\$44,255.36	\$61,593.12
Administrative Costs	\$31,862.52	\$38,793.22	\$49,440.69
Office Supplies	\$12,000	\$12,240	\$12,484.80
Software Subscriptions	\$19,862.52	\$26,553.22	\$36,955.89
Revenue Specific Costs	\$0	\$0	\$0
Personnel Costs (Direct Labor)	\$0	\$0	\$0
Gross Margin	\$537,116.79	\$740,257.92	\$1,057,173.69
Gross Margin (%)	81.13%	83.63%	85.82%
Operating Expense	\$642,563.34	\$665,616.66	\$693,959.22
Payroll Expense (Indirect Labor)	\$545,280	\$557,840.40	\$570,704.64
Management Team	\$264,000	\$270,480	\$277,125.60
Chief Operating Officer	\$120,000	\$123,600	\$127,308
Property Manager	\$144,000	\$146,880	\$149,817.60
Administrative Staff	\$89,040	\$90,627.60	\$92,244
Office Administrator	\$50,400	\$51,408	\$52,436.16
Receptionist	\$38,640	\$39,219.60	\$39,807.84
Maintenance Staff	\$192,240	\$196,732.80	\$201,335.04
Maintenance Supervisor	\$64,800	\$66,744	\$68,746.32

	2024	2025	2026
Maintenance Worker	\$127,440	\$129,988.80	\$132,588.72
General Expense	\$97,283.34	\$107,776.26	\$123,254.58
Office Expenses	\$42,000	\$42,900	\$43,819.80
Office Rent	\$36,000	\$36,720	\$37,454.40
Utilities	\$6,000	\$6,180	\$6,365.40
Marketing and Advertising	\$38,483.34	\$47,644.26	\$61,759.26
Digital Marketing	\$26,483.34	\$35,404.26	\$49,274.46
Print Advertising	\$12,000	\$12,240	\$12,484.80
Professional Services	\$16,800	\$17,232	\$17,675.52
Legal Services	\$9,600	\$9,888	\$10,184.64
Accounting Services	\$7,200	\$7,344	\$7,490.88
Bad Debt	\$0	\$0	\$0
Amortization of Current Assets	\$0	\$0	\$0
EBITDA	(\$105,446.53)	\$74,641.25	\$363,214.52
Additional Expense	\$9,995.53	\$9,450.30	\$8,871.41
Long Term Depreciation	\$7,236	\$7,236	\$7,236
Gain or loss from Sale of Assets	\$0	\$0	\$0
EBIT	(\$112,682.53)	\$67,405.25	\$355,978.52
Interest Expense	\$2,759.52	\$2,214.28	\$1,635.41
EBT	(\$115,442.06)	\$65,190.95	\$354,343.11
Income Tax Expense / Benefit	\$0	\$0	\$0

	2024	2025	2026
Total Expense	\$777,525.56	\$819,915.55	\$877,518.39
Net Income	(\$115,442.06)	\$65,190.95	\$354,343.11
Net Income (%)	(17.44%)	7.37%	28.76%
Retained Earning Opening	\$0	(\$150,442.06)	(\$95,251.11)
Owner's Distribution	\$35,000	\$10,000	\$10,000
Retained Earning Closing	(\$150,442.06)	(\$95,251.11)	\$249,092

Projected Cash Flow

	2024	2025	2026
Cash Received	\$662,083.50	\$885,106.50	\$1,231,861.50
Cash Paid	\$770,289.58	\$812,679.53	\$870,282.42
COS & General Expenses	\$222,250.05	\$252,624.83	\$297,942.37
Salary & Wages	\$545,280	\$557,840.40	\$570,704.64
Interest	\$2,759.52	\$2,214.28	\$1,635.41
Sales Tax	\$0	\$0	\$0
Income Tax	\$0	\$0	\$0
Net Cash From Operations	(\$108,206.08)	\$72,426.97	\$361,579.08
Assets Sell	\$0	\$0	\$0
Assets Purchase	\$50,000	\$0	\$0
Net Cash From Investments	(\$50,000)	\$0	\$0
Amount Received	\$150,000	\$0	\$0

	2024	2025	2026
Loan Received	\$50,000	\$0	\$0
Common Stock	\$100,000	\$0	\$0
Preferred Stock	\$0	\$0	\$0
Owner's Contribution	\$0	\$0	\$0
Amount Paid	\$43,840.15	\$19,385.38	\$19,964.27
Loan Capital	\$8,840.16	\$9,385.40	\$9,964.27
Dividends & Distributions	\$35,000	\$10,000	\$10,000
Net Cash From Financing	\$106,159.85	(\$19,385.38)	(\$19,964.27)

Summary

Starting Cash	\$0	(\$52,046.23)	\$995.36
Cash In	\$812,083.50	\$885,106.50	\$1,231,861.50
Cash Out	\$864,129.73	\$832,064.91	\$890,246.69
Change in Cash	(\$52,046.23)	\$53,041.59	\$341,614.81
Ending Cash	(\$52,046.23)	\$995.36	\$342,610.17

Projected Balance Sheet

	2024	2025	2026
Assets	(\$9,282.23)	\$36,523.36	\$370,902.17
Current Assets	(\$52,046.23)	\$995.36	\$342,610.17
Cash	(\$52,046.23)	\$995.36	\$342,610.17
Accounts Receivable	\$0	\$0	\$0
Inventory	\$0	\$0	\$0
Other Current Assets	\$0	\$0	\$0

	2024	2025	2026
Long Term Assets	\$42,764	\$35,528	\$28,292
Gross Long Term Assets	\$50,000	\$50,000	\$50,000
Accumulated Depreciation	(\$7,236)	(\$14,472)	(\$21,708)
Liabilities & Equity	(\$9,282.22)	\$36,523.33	\$370,902.17
Liabilities	\$41,159.84	\$31,774.44	\$21,810.17
Current Liabilities	\$9,385.40	\$9,964.27	\$0
Accounts Payable	\$0	\$0	\$0
Income Tax Payable	\$0	\$0	\$0
Sales Tax Payable	\$0	\$0	\$0
Short Term Debt	\$9,385.40	\$9,964.27	\$0
Long Term Liabilities	\$31,774.44	\$21,810.17	\$21,810.17
Long Term Debt	\$31,774.44	\$21,810.17	\$21,810.17
Equity	(\$50,442.06)	\$4,748.89	\$349,092
Paid-in Capital	\$0	\$0	\$0
Common Stock	\$100,000	\$100,000	\$100,000
Preferred Stock	\$0	\$0	\$0
Owner's Contribution	\$0	\$0	\$0
Retained Earnings	(\$150,442.06)	(\$95,251.11)	\$249,092
Check	\$0	\$0	\$0

Business Ratios


	Year 1	Year 2	Year 3	Industry Profile
Sales Growth	4,35%	30,82%	63,29%	4,00%

	Year 1	Year 2	Year 3	Industry Profile
Percent of Total Assets				
Accounts Receivable	5,61%	4,71%	3,81%	9,70%
Inventory	1,85%	1,82%	1,79%	9,80%
Other Current Assets	1,75%	2,02%	2,29%	27,40%
Total Current Assets	138,53%	150,99%	163,45%	54,60%
Long-term Assets	-9,47%	-21,01%	-32,55%	58,40%
TOTAL ASSETS	100,00%	100,00%	100,00%	100,00%
Current Liabilities	4,68%	3,04%	2,76%	27,30%
Long-term Liabilities	0,00%	0,00%	0,00%	25,80%
Total Liabilities	4,68%	3,04%	2,76%	54,10%
NET WORTH	99,32%	101,04%	102,76%	44,90%
Percent of Sales				
Sales	100,00%	100,00%	100,00%	100,00%
Gross Margin	94,18%	93,85%	93,52%	0,00%
Selling, General & Administrative Expenses	74,29%	71,83%	69,37%	65,20%
Advertising Expenses	2,06%	1,11%	0,28%	1,40%
Profit Before Interest and Taxes	26,47%	29,30%	32,13%	2,86%
Main Ratios				
Current	25,86	29,39	32,92	1,63
Quick	25,4	28,88	32,36	0,84
Total Debt to Total Assets	2,68%	1,04%	0,76%	67,10%
Pre-tax Return on Net Worth	66,83%	71,26%	75,69%	4,40%
Pre-tax Return on Assets	64,88%	69,75%	74,62%	9,00%
Additional Ratios				
Net Profit Margin	19,20%	21,16%	23,12%	N.A.
Return on Equity	47,79%	50,53%	53,27%	N.A.
Activity Ratios				
Accounts Receivable Turnover	4,56	4,56	4,56	N.A.

	Year 1	Year 2	Year 3	Industry Profile
Collection Days	92	99	106	N.A.
Inventory Turnover	19,7	22,55	25,4	N.A.
Accounts Payable Turnover	14,17	14,67	15,17	N.A.
Payment Days	27	27	27	N.A.
Total Asset Turnover	1,84	1,55	1,26	N.A.
Debt Ratios				
Debt to Net Worth	0	-0,02	-0,04	N.A.
Current Liab. to Liab.	1	1	1	N.A.
Liquidity Ratios				
Net Working Capital	\$120 943	\$140 664	\$160 385	N.A.
Interest Coverage	0	0	0	N.A.
Additional Ratios				
Assets to Sales	0,45	0,48	0,51	N.A.
Current Debt/Total Assets	4%	3%	2%	N.A.
Acid Test	23,66	27,01	30,36	N.A.
Sales/Net Worth	1,68	1,29	0,9	N.A.
Dividend Payout	0	0	0	N.A.

Maxwell Property Management

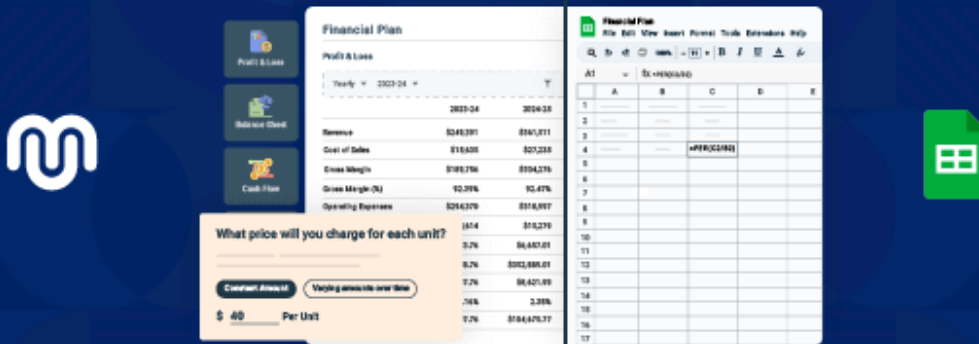
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Upmetrics vs Financial Spreadsheets

Spreadsheets can be a powerful tool for preparing complex financial reports and forecasts. However, using them can be quite time-consuming, intimidating, and frustrating.



The image shows a side-by-side comparison of two financial planning tools. On the left is the Upmetrics interface, which is clean and user-friendly. It features a sidebar with navigation options: 'Profit & Loss', 'Balance Sheet', and 'Cash Flow'. The main area displays a 'Financial Plan' for 'Profit & Loss' for the year 2023-24. A table shows financial metrics for two periods: 2023-24 and 2024-25. Below the table is a form to input 'What price will you charge for each unit?' with a 'Convert Annual' button and a 'Viewing amounts over time' option. On the right is a standard spreadsheet interface with a grid and various toolbars. A green document icon with a grid pattern is positioned to the right of the spreadsheet.

	2023-24	2024-25
Revenue	\$241,391	\$181,811
Cost of Sales	\$16,620	\$27,233
Gross Margin	\$191,756	\$154,276
Gross Margin (%)	79.5%	85.0%
Operating Expenses	\$214,379	\$118,987
	104	\$1,279
	0.2%	\$6,657.01
	0.2%	\$102,888.01
	0.2%	\$6,621.89
	0.6%	2,386
	0.2%	\$184,670.77

Upmetrics could be your way out of boring & clumsy spreadsheets. Simply enter the numbers, and get accurate and easy-to-understand financial reports made in minutes - no more remembering complex formulas or fussing in the spreadsheet.

[Start your planning today](#)

Create a winning business plan that gets you funded

Creating a stunning and investment-ready plan requires no writing, graphic designing, or financial planning expertise.

Upmetrics has all the features required to help you create a comprehensive business plan—from start to finish. Make no mistakes, it's the modern way of planning to structure ideas, make plans, and create stunning pitch decks to awe investors.

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Mariia Yevlash



Student, Sumy State University – Ukraine

The most helpful feature was to make a business plan out of a simple idea. Thankful for all the tools provided, **especially AI which did a great impact on my work.**

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